



When to get an accountant

Consider your Business Entity – this is a legal distinction, not an accounting distinction. Examples: LLC, PLLC, PC

Open a business bank account

Be honest about how “on it” you’re going to be with tracking your finances

- If you aren’t going to be diligent, consider a bookkeeper/accountant sooner
- If you will be diligent, keep a spreadsheet of all you spend & make in the business

Allow your imperfect system to keep evolving

Get an accountant before tax time so you can get on their caseload before they’re overwhelmingly busy.